

Your Guide to Start Using iManage



iManage
DeskSite



Microsoft
Outlook



Internet
Explorer

Working

with

iManage



iManage Document Management

Software:
DeskSite 6.x
MailSite 3.x
WorkSite Web 4.1

Table of Contents

Introduction.....	4
What is Document Management?	4
iManage Databases	4
Integration with Your Software Applications.....	5
Benefits	5
Using DeskSite.....	6
How Does Document Management Work?	6
Finding and Retrieving Documents	7
Creating Documents from within an Application.....	8
Document Numbers	8
Updating Documents	8
Editing/Updating a Document Profile	9
Searching for Documents.....	10
Full-Text Searches	11
Full-Text Tips	12
Importing Documents	13
Checking Documents Out and In.....	14
Checking Out a Document.....	14
Checking a Document Back In	15
Creating Folders.....	16
Saving Web Pages or URLs.....	17
Using MailSite	19
Retrieving Documents	19
Adding Email and Attachments into iManage.....	21
Attaching a Document from iManage to an Email	22
Using WorkSite Web	24
Login.....	24
EBT Start Page.....	25
Worklist & Folders	26
Searching	26
Working with Documents	27
Obtaining a Local Copy	28
Editing a Document Already in the System.....	29
Importing a New Document.....	31
Internet Explorer Browser Requirements & Settings	33

Introduction

What is Document Management?

Every day you create, edit, and save project related documents. When many people are storing and retrieving the same documents it can become a nightmare if you can't immediately recall where you saved a file or if you looking at the latest version of the document.

iManage is a document management system (DMS). A DMS becomes your electronic file clerk. You tell the DMS some information about a new document, such as the author and subject and the DMS files the document for you. When you want to find the document you tell the DMS to get you the document(s) for the subject and the DMS finds the document for you very quickly.

One of the most beneficial aspects of the DMS is you do not need to remember where the document is filed. All you need to remember is any single piece of information about the document, such as:

The **author** of the document

The person **who input** the document

Any word contained in the **description** or **title**

Any **unique word** or **phrase** contained within the document text

The approximate **date** the file was created

The Hardcopy Location or Originating office

The document **class** or **category**, such as "Invoice," "Report/Study", or "Executive only"

iManage provides access to documents 3 different ways: DeskSite, MailSite, and WorkSite Web:

DeskSite is a full-featured client application that integrates with other applications such as Microsoft Word and Excel

MailSite is a part of Microsoft Outlook and primarily provides the ability to easily insert email and attachments into the database as well as the ability to access to documents already in the database without opening a separate application

WorkSite Web is a web based client that provides access via Microsoft Internet Explorer. It is primarily used by remote users or by external users with internet access to access documents already in the database and to add new documents into the database, if allowed.

iManage Databases

When you fill in a profile you create a database record for your document. All documents created in your organization are automatically recorded in a database.

Integration with Your Software Applications

iManage integrates with many major Windows applications. Therefore when you invoke **File Open, Save, Save As or Insert/File** iManage automatically assists you.

Benefits

Take some time to review the table of benefits below. You may be surprised at just how much the iManage DMS can do for you.

Feature	Description/Benefit
Toolbar	The iManage window features an easy-to-use toolbar interface with icons for all major functions.
Worklist	The last 40 documents you worked on are stored in the Worklist. This allows for instant retrieval of the most recent documents you created or accessed.
Profile Searching	Documents can be easily located by recalling as little as one item from the profile.
Full-text Searching	Documents can be easily located based upon text contained in the document.
Document History	iManage maintains a complete history of activity for every document. When other users have viewed or edited your document iManage keeps an audit trail of activity.
Saved Searches	If you perform the same searches frequently you can save the search criteria for easy retrieval later.
Access Control (Security)	You control which users or groups of users have access to your documents.
Profile Defaults	You can make profile creation faster by having defaults for fields that are the same most the time.
Version Control	You can create multiple versions of the same document.
Projects	You can associate documents with specific project folders speeding access to a select group of documents.
Check In or Out	You can check out documents to ensure that no other users change them when you are collaborating on a document.
Related Documents	You can easily relate documents to each other

Using DeskSite

How Does Document Management Work?

Whenever you save a document, you fill in a document profile that describes the document. A Profile Screen is illustrated below.

The screenshot shows a Windows-style dialog box titled "EBT New Profile File imported into: \\EBT_SRV3\EBTdocs". The dialog is divided into several sections:

- Required Fields:** This section contains the following fields:
 - Title: A text input field.
 - Doc Date: A date picker showing "05/21/2001".
 - Class: A text input field with a green exclamation mark icon and a "... Class" button.
 - Orig. Office: A text input field with a "... Orig. Office" button.
 - Owner: A text input field with a green exclamation mark icon and a "... Owner" button.
 - Category: A text input field with a "... Category" button.
 - Originator/Author: A text input field.
 - Click/Complete -->: A button labeled "Description".
 - Distribution: A text input field.
 - Hardcopy Loc.: A text input field with a "... Hardcopy Loc." button.
 - Operator: A text input field with a green exclamation mark icon and a "... Kelly Gasca" button.
 - Type: A text input field with a green exclamation mark icon and a "... Acrobat Reader" button.
- Memo/ Misc.:** A text input field.
- Archive Date:** A date picker showing "05/21/2001".
- Destroy Date:** A date picker showing "05/21/2001".
- Database:** A dropdown menu showing "EBT docs" and a "... Database" button.
- Security:** A section with an "Access Rights" button and a dropdown menu showing "Private".
- SecurityTemplate:** A dropdown menu showing "<None>".
- Buttons:** "OK", "Cancel", "Help", and "Duplicate Profile From..." buttons.

Filling out a document profile takes only a few seconds. Once the profile is complete, iManage files the document on your file server for you, using the information in the profile to store it in the correct location.

Finding and Retrieving Documents

When you need to retrieve a document, you can quickly access a list of recently edited documents (**Worklist**) or you can initiate a search. Your **Worklist** is a list of the last 40 documents you have worked with. A search requires filling in a blank profile screen with one or more pieces of information you remember about the document such as author and type and then clicking the **Find** button to start the search. Within a few seconds, all files that match your criteria are listed on your screen as a **Search Result** or **Worklist** like the one below.

This area contains the results.

The screenshot displays the iMANAGE Desktop application. On the left, a sidebar shows a tree view with 'iManage Databases' expanded, containing 'Worklist', 'Checkedout Docs', 'Search History', and 'iManage'. The 'Worklist' icon is selected. The main window shows a table of documents with columns: Database, Description, Doc. Num, Ver..., Author, Class, Edit Date, and File Size. The document 'iManage screenshots' (Doc. Num 439) is selected. Below the table, the 'Document Profile' for 'Document: 439_1.DOC (iManage screenshots)' is shown, with fields for Description, Doc. Num, Version, App. Type, Class, Bureau, Program, and Comments. The status bar at the bottom indicates '1 document(s) selected', 'DNEWTON', and '33 Items'.

Database	Description	Doc. Num	Ver...	Author	Class	Edit Date	File Size
iManage	iManage screenshots	439	1	DNEWTON	DELETE	1/3/2001 9:22:30 AM	56KB
iManage	iManage Pilot group user training flye	428	1	DNEWTON	COMMUNIC	1/3/2001 9:17:22 AM	22KB
iManage	pc-coord	4	1	POQUIN	OTHER	12/26/2000 9:48:44 AM	23KB
iManage	iManage pilot group membership	429	1	DNEWTON	OTHER	12/21/2000 10:30:14 AM	19KB
iManage	Troubleshooting Internet connection	345	1	JSIEGEL	FORM	12/19/2000 10:46:40 AM	21KB
iManage	Internet connection problems spread	358	1	JSIEGEL	OTHER	12/18/2000 10:02:43 AM	16KB
iManage	PC Coordinator Meeting Agenda	255	1	POQUIN	OTHER	12/14/2000 2:37:07 PM	21KB
iManage	imanager tasks & responsibilities	260	1	DNEWTON	DOCUMENT	12/11/2000 11:43:16 AM	14KB
iManage	Software & Hardware Maintenance	46	1	DNEWTON	OTHER	12/7/2000 9:35:06 AM	21KB
iManage	iManage Planning Meeting Summary	337	1	DNEWTON	MEETING	12/6/2000 1:51:38 PM	30KB
iManage	handhelds	164	1	DNEWTON	ADMIN	12/6/2000 12:09:30 PM	21KB
iManage		153	1	PZOGRAF	DOCUMENT	11/30/2000 3:16:05 PM	19KB
iManage	iManage Planning Meeting	330	1	DNEWTON	MEETING	11/28/2000 9:23:05 AM	20KB
iManage	iManage Task Access Requirements	271	2	DNEWTON	DOCUMENT	11/27/2000 11:43:20 AM	36KB
iManage	Intercom article for CiscoSecure upg	267	1	JSIEGEL	MEMO	11/16/2000 1:32:23 PM	19KB
iManage	CiscoSecure upgrade	263	1	JSIEGEL	OTHER	11/16/2000 1:32:17 PM	24KB

Document Profile - Document: 439_1.DOC (iManage screenshots)

Profile Fields	Content
Description	iManage screenshots
Doc. Num	439
Version	1
App. Type	WORD97
Class	DELETE
Bureau	ITB
Program	
Comments	

1 document(s) selected DNEWTON 33 Items

Creating Documents from within an Application

EBT New Profile File imported into: \\EBT_SRY3\EBTdocs

Required Fields

Title: New Document Example

Doc Date: 05/21/2001

Class: COUNTY (An ! denotes a required field.)

Orig. Office: SANTA_CRUZ

Owner: KGASCA (An ! denotes a required field.)

Category: CORRESPONDENCE

Originator/Author:

Click/Complete -->: Description

Distribution:

Hardcopy Loc.: SANTACRUZ1

Operator: KGASCA (An ! denotes a required field.)

Type: ACRBAT (An ! denotes a required field.)

Memo/ Misc.:

Archive Date: 05/21/2001

Destroy Date: 05/21/2001

Buttons: OK, Cancel, Help, Duplicate Profile From...

Database: EBT docs

Security: Access Rights, Public

SecurityTemplate: <None>

To create a new document in your application, select File/Save or File/Save As from the application's menu bar.

Fill out the New Profile Screen. If you need to look up the available valid entries for the field click on the [...] button to the right of the field to display valid entries.

Click OK and continue working on your document.

Document Numbers

Each new document you create is assigned a sequential unique number. The document number is not assigned until you complete the profile and click on the OK button. When a document is deleted from the iManage system the document's number is not re-used.

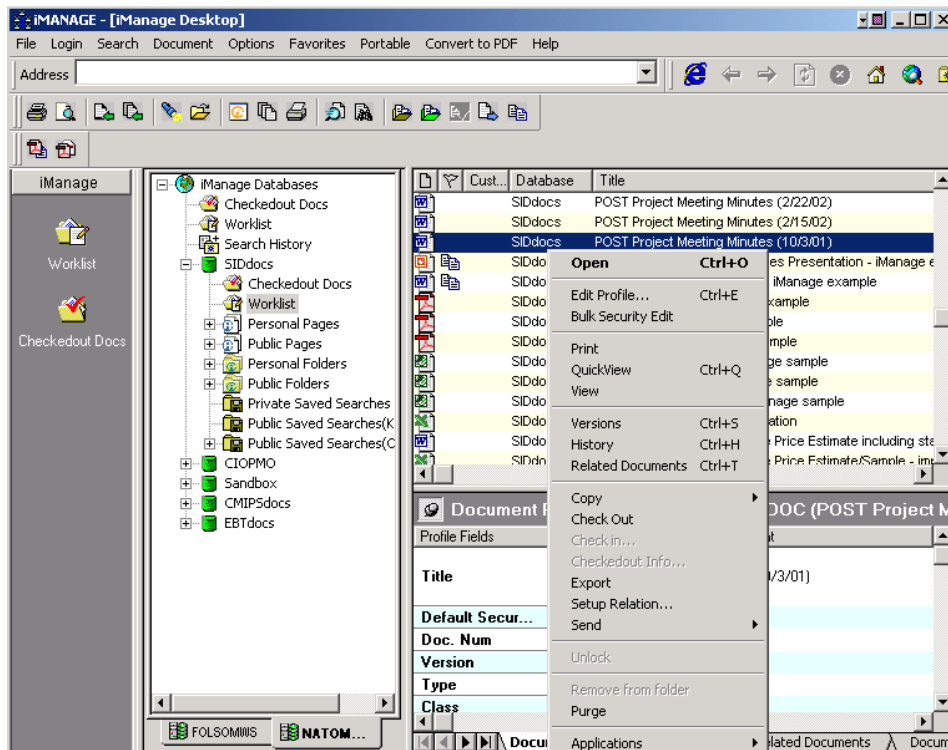
The document number can be displayed on the Worklist and Search Results List.

Updating Documents

You need only create a document profile once for each document. Subsequent saves update the document without further prompting. You can edit the profile any time you need to.

Editing/Updating a Document Profile

You may need to edit the information contained in a document profile. When displaying the Work List or a Search Result list with the iManage application window, the list displays in its own window. **An Action Menu is displayed by right-clicking the mouse on a document in the list.** A sample Action Menu featuring the Edit Profile option is illustrated below.



Choose Edit Profile to make changes to the profile. Click OK to complete your work and save your changes.

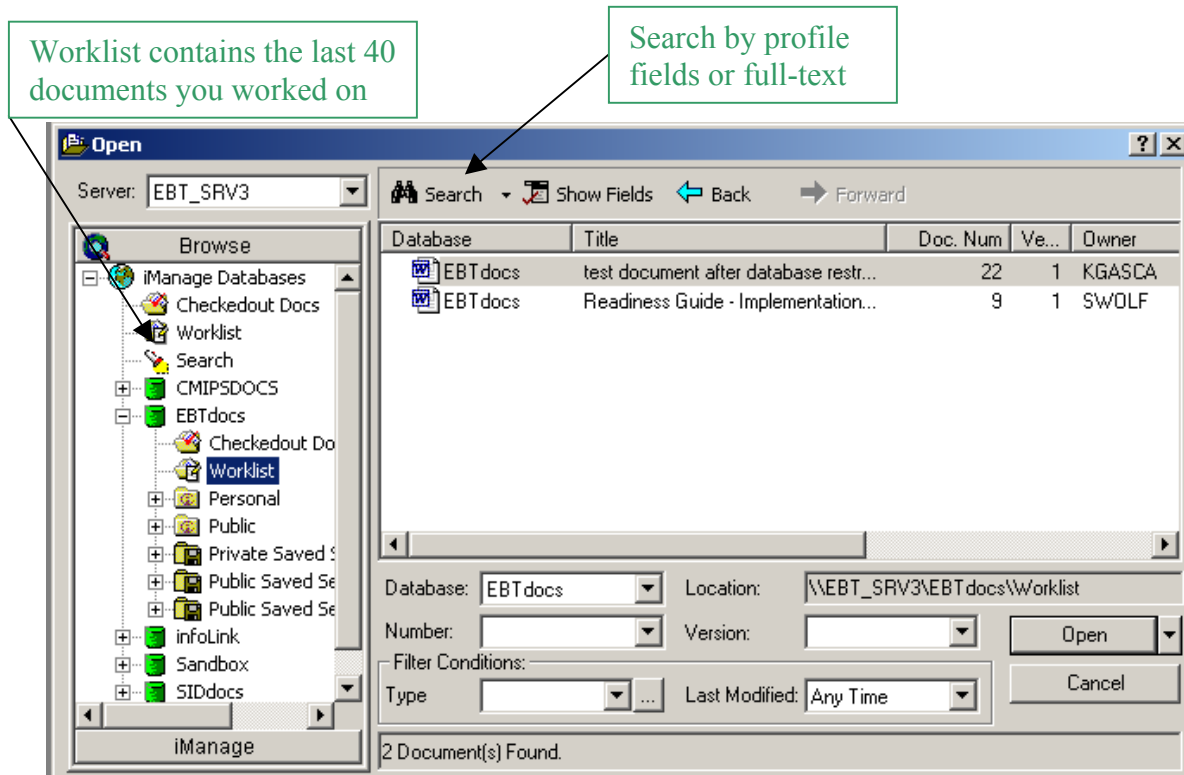
Many integrated applications also allow you to edit a Document Profile within your windows application. In this case you can select the *Edit Profile* option from the *File* menu.

Searching for Documents

If you don't recall a document's number and if it was not recently edited you must search the iManage database for the document. You must remember at least one detail about the profile or the document. For example, who is author? During what time period was the document created? What are some of the words that may have been used in the title?

To search for documents from your windows application, such as MS Excel or Word, select **File, Open** from your application's menu.

The following screen will appear.




This dialog box allows you to search in many different ways.

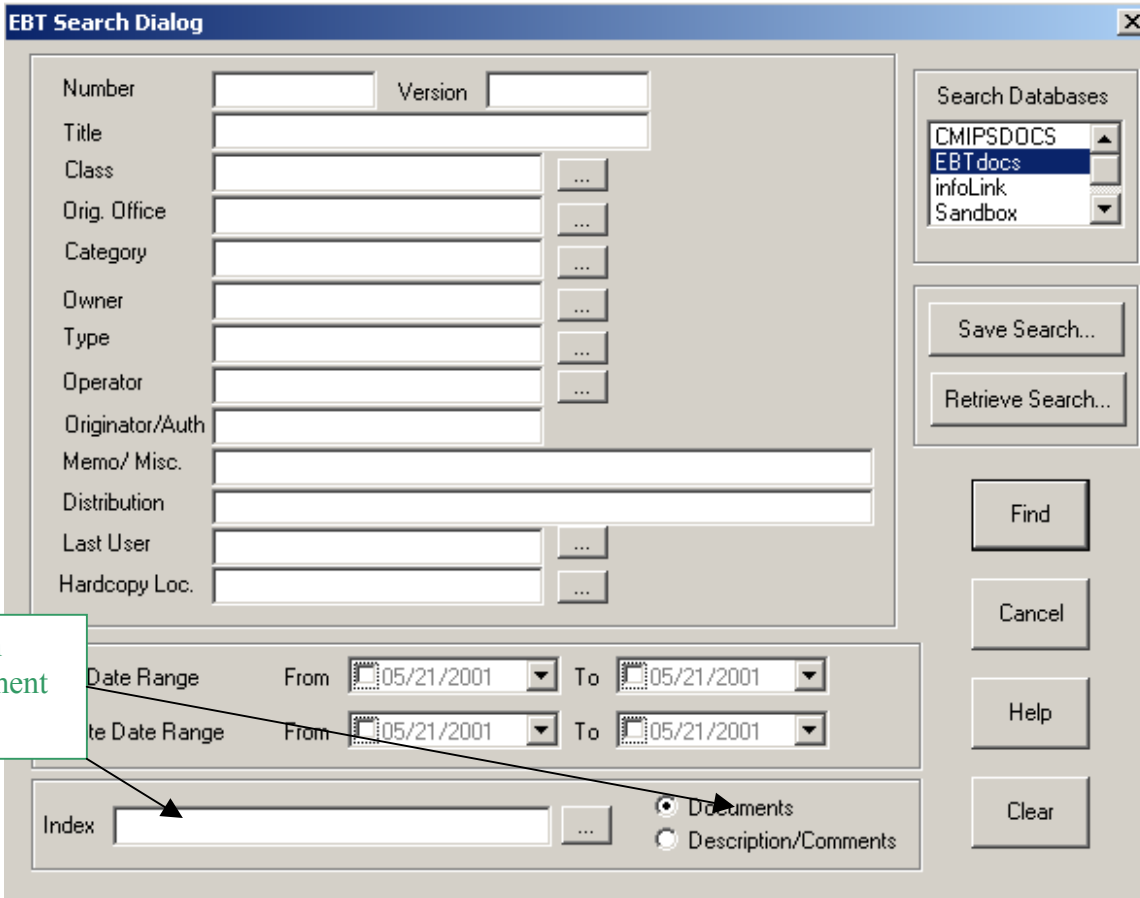
Worklist – the last 40 documents you have worked on

Document Number – if you know the document number

Profile or Full Text Search – search on any profile field(s) or full-text of the documents

The most common search is a Profile Search. To initiate a Profile/Search

Click on the **Search** button  and the profile search screen will appear.



The image shows the 'EBT Search Dialog' window. It contains several input fields for search criteria: Number, Version, Title, Class, Orig. Office, Category, Owner, Type, Operator, Originator/Auth, Memo/ Misc., Distribution, Last User, and Hardcopy Loc. To the right of these fields are buttons for selecting values (indicated by three dots). On the right side of the dialog, there is a 'Search Databases' list with 'CMIPSDOCS', 'EBT docs' (selected), 'infoLink', and 'Sandbox'. Below this list are buttons for 'Save Search...', 'Retrieve Search...', 'Find', 'Cancel', 'Help', and 'Clear'. At the bottom, there are two date range selectors, each with 'From' and 'To' date pickers set to 05/21/2001. Below the date ranges is an 'Index' text box and two radio buttons: 'Documents' (selected) and 'Description/Comments'. A green callout box on the left contains the text 'Search Document Text' with two arrows pointing to the 'Index' text box and the 'Documents' radio button.

Click the **Clear** button to clear any previous search criteria, if necessary.

In the appropriate fields, type any information you remember about the document(s) you're looking for.

Click the **Find** button.

From the resulting **Search Result** list, double-click the document you want to open.

Full-Text Searches

If you want to locate a document or documents based upon the occurrence of words or phrases within the documents you can employ a full-text search. Text phrases or words are input in the box labeled **Index** in the **Search Dialog** box.

Boolean operators (AND, OR, NOT) are used to fine-tune your search. For example, typing **scully AND mulder** in the Index box locates documents containing both names. Typing **scully OR mulder** locates documents containing either or both names.

The asterisk “*” or the question mark(?) wildcard characters can be used in the index field.

* - Use to represent two or more letters in a word, i.e. Ander*

? – Use to represent one letter in a word, i.e. Anders?n

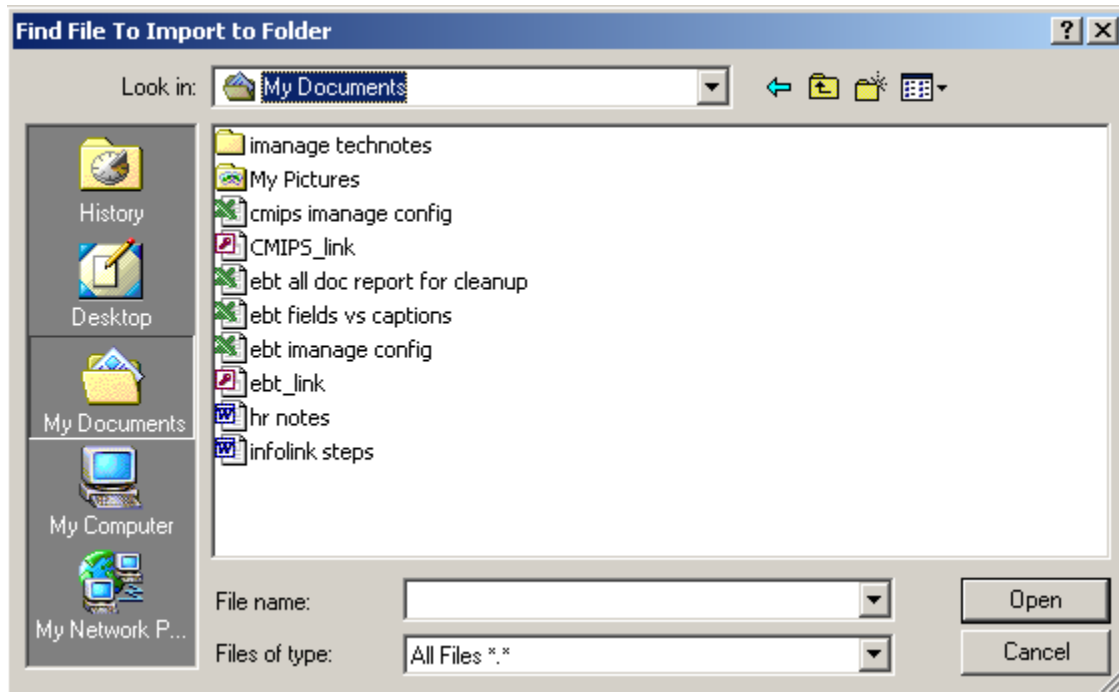
Full-Text Tips

The following table presents some important information regarding full-text searches.

Character/Word	Explanation
A, an, the, of, not	Words that are high frequency are called “stop words” and are not indexed. Do not use these words to do your searches.
AND	Typing AND between search terms tells iManage to find documents containing both words. The words can be anywhere in the document and thus do not have to be together in a sentence.
Any phrase	When you type a phrase (any two or more words) the words must be together in a search. For example a search for “pine tree” would not find the phrase “a pine is a tree”. A better search would be “pine AND tree”.
Apostrophes	Ignored. O’Malley is stored as Omalley.
Hyphens	Hyphenated words are indexed as four possible words. Double-play is indexed as double, play, doubleplay and double-play.
Illegal Characters	Do not use the following in search criteria: “,:@[]<=&{}/~ These are reserved for special purposes.
NOT	Typing NOT in front of a search term tells iManage to exclude documents containing the term. Type: Pine NOT tree to located documents containing pine but not when the document also contains tree
OR	Typing OR between search terms tells iManage to find documents containing either or both of the words or phrases.
Parentheses	Use () to clarity a search. (Pine OR tree) NOT Oak evaluates the terms in parentheses first.
Plural words	Full-text searches regard the searches as literal. If you want to include plurals or tenses use the * wildcard operator. To find stadium or stadiums type: Stadium*.
Quotation marks	Quotes are ignored when documents are indexed

Importing Documents

It is common for people to want to import a document created at home or somewhere else into iManage. The most straight forward method is to use iManage Import, located on DeskSite's menu under File, Import. Selecting this option displays the following dialog box.



Use **Drives**, **directories**, and **File Name** lists to select the desired file , then click **OPEN**. iManage presents a new profile screen for you to fill in for the imported file. Complete the profile and click **OK**.

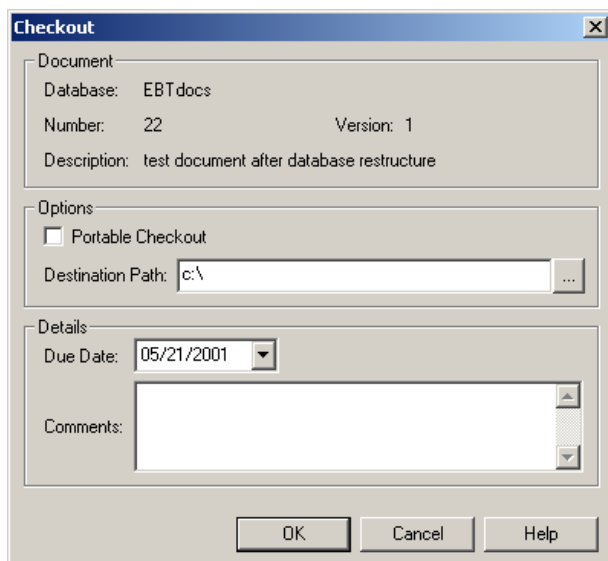
Checking Documents Out and In

If you want to take a document out of the office with you that is managed by iManage you can check it out of the system onto a diskette or laptop hard drive. Checking out a document registers you as the “borrower” of the document so that other users know who has taken the document. The document itself is not removed from the network—it is copied—but the original document on the network is “locked” until the checked out document is returned.

If any valid user tries to open a document that is checked out, iManage displays a prompt stating that the document is checked out and allows them to open a read-only copy.

Checking Out a Document

Switch to the iManage application window and display the Work List or perform a search to display a Search Result list that contains the document you want to check out. Select the desired document from the list. Next, right click on it and choose **Document, Checkout** from the iManage action menu. The Checkout Document dialog box appears.



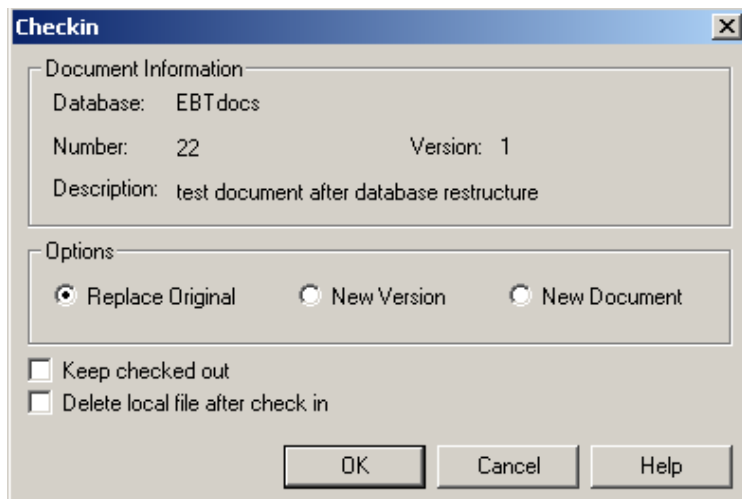
In the Options box you can check the Portable Checkout option (this checks the document out to a pre-defined directory for use with iManage when the network is unavailable (for example if you have a docking laptop).

If you want to check it out for other purposes, fill in the destination path where you want to save it. For example, c:\my documents or a:\. You can change the destination by clicking on the [...] button. You are asked to supply a date when you expect to return the document and you provide comments on why you are borrowing the document.

Once you click OK, the document is copied to the specified location and the document is flagged as “checked out.”

Checking a Document Back In

Switch to the iManage application window and display the Checked Out Documents or Worklist or perform a search to display a Search Result list that contains the document you want to check in. Highlight the document and right click. Choose **Checkin** from the iManage action menu and the following dialog is displayed.



Replace Original – This is the default setting. The document on the network is overwritten by the incoming version from diskette.

New Version – The diskette copy becomes a new version of the network document. iManage presents the New Version Profile dialog so that you can fill in a profile for a new version.

New Document – The diskette copy becomes a new document and you are asked to fill in a new Document Profile for the incoming document.

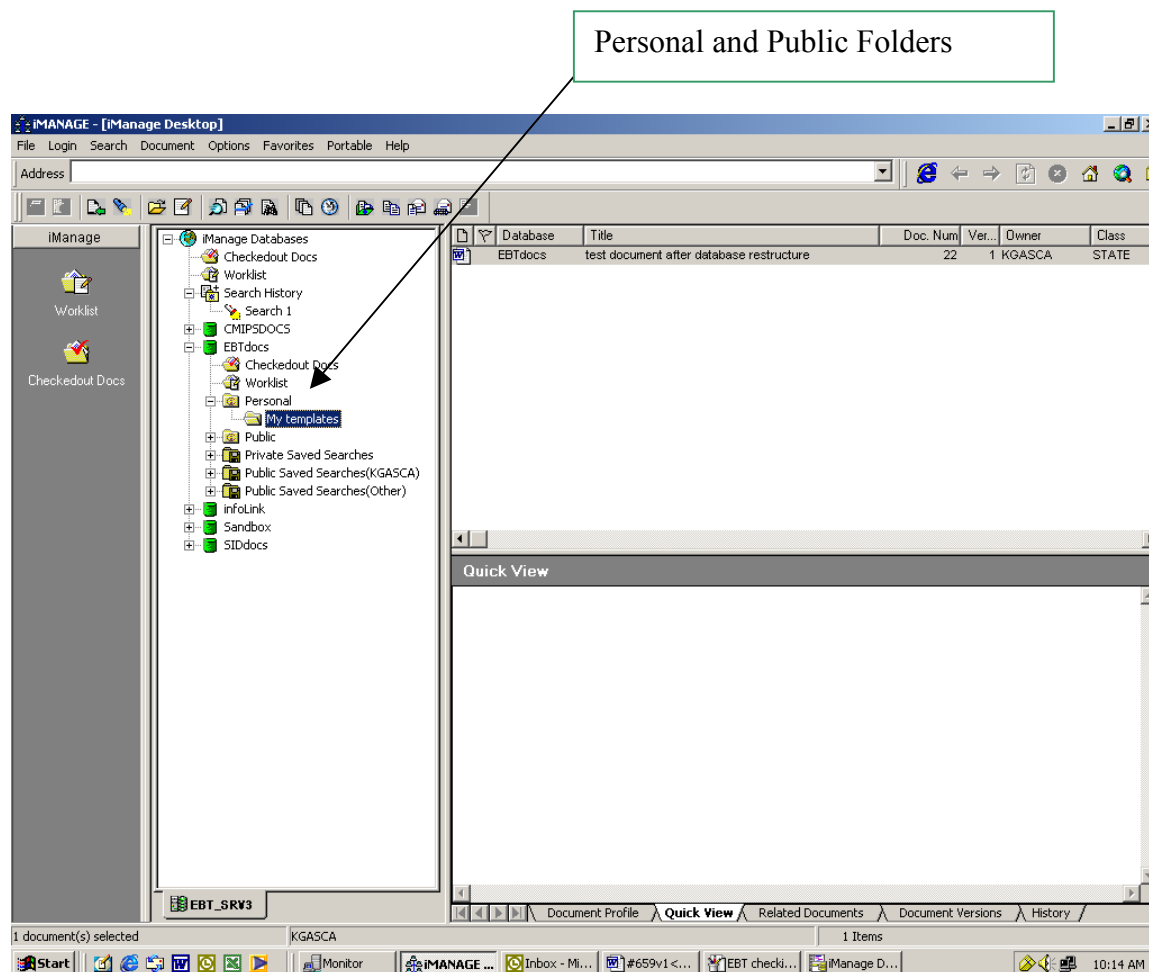
Keep Checked Out – After copying the document back into the database, the system keeps the document status checked out – this prevents others for editing it.

Delete local file after check in – The local file will be deleted after adding it to the database – this prevents old and stray copies from building up on the diskette or laptop.

Creating Folders

When you are working on a specific project there are often several documents related to that project. iManage allows you to create a project folder for documents and give the folder a name. The next time you want to see that set of documents you display the project folder.

Project folders can be personal (private) or public as shown below. Users can create personal (private) folders, but only administrators can create public folders since they appear on everyone's DeskSite desktop.



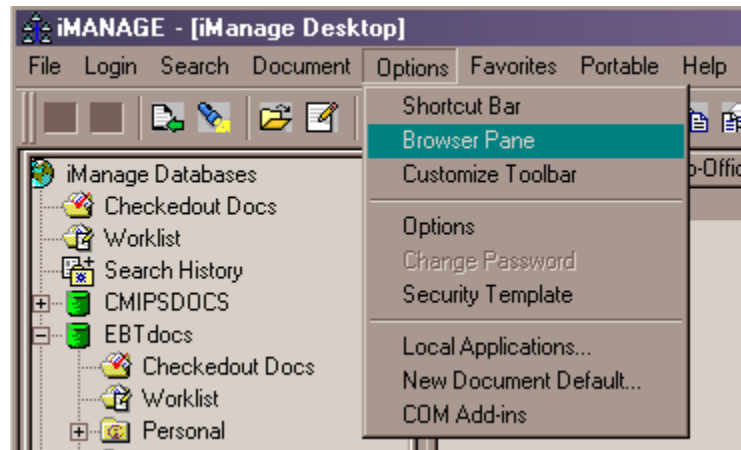
Once folders are created, they can be displayed from the iManage desktop by clicking on the appropriate folder as shown above.

Right-click on the Personal folder and click on the “create” button in order to create a new folder. To add documents to the folder you can perform a search or use your worklist and then drag and drop documents from the search results or worklist into the folder. The documents are not actually copied to the folder, only links to the documents are placed there.

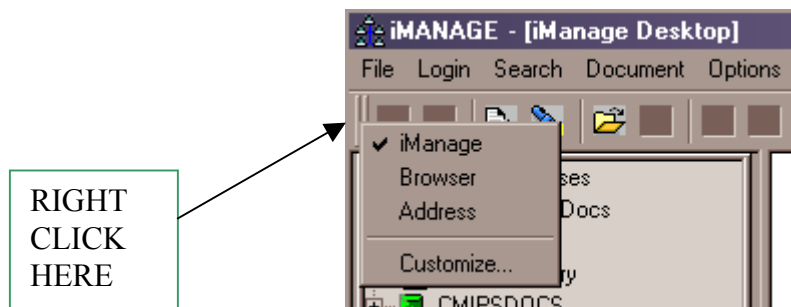
Saving Web Pages or URLs

You can save web pages or URLs in iManage. In order to accomplish this, follow the following steps to enable the browser features in DeskSite:

First, enable the Browser Pane in the DeskSite client – go to the Options menu, check Browser Pane. The right side of your DeskSite client will turn into a “mini” Internet Explorer window.



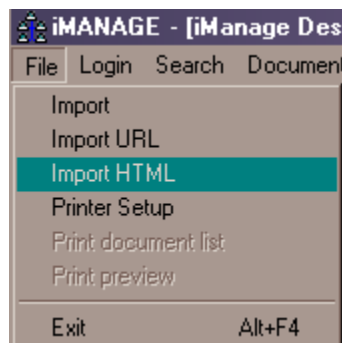
Second, Modify the DeskSite toolbar to include Internet Explorer items. Position your mouse to the left side of the DeskSite toolbar and RIGHT CLICK. Select Browser and then Address



Your DeskSite client will now look similar to this:



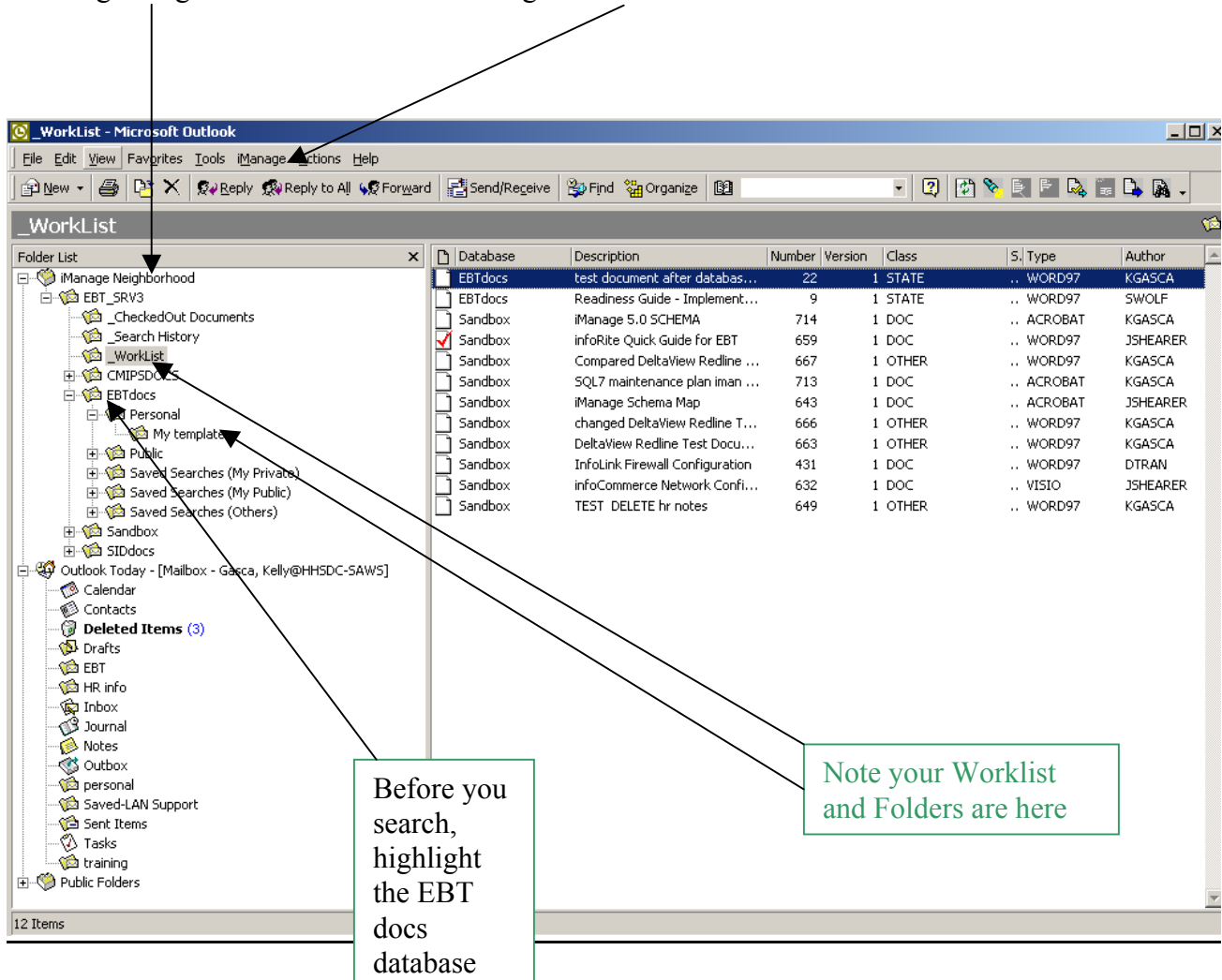
When you come across a web page you want to add into iManage as a document, choose File, Import HTML to save the web page (choose Import URL to save just a link to that web address)... Fill out the profile and click OK.



It is important to remember that the internet is a very dynamic and even unstable place. If you save a URL (link), it may not be valid in 6 months, or even the next day. It is best to use links for main website addresses/home pages that don't change, e.g. www.hhsdc.ca.gov. Don't use links for any secondary pages, e.g. <http://www.sfbg.com/News/35/36/36edwelf.html>

Using MailSite

When installed, iManage's MailSite client appears in your Microsoft Outlook Folder List as "iManage Neighborhood" and as an iManage Menu Item

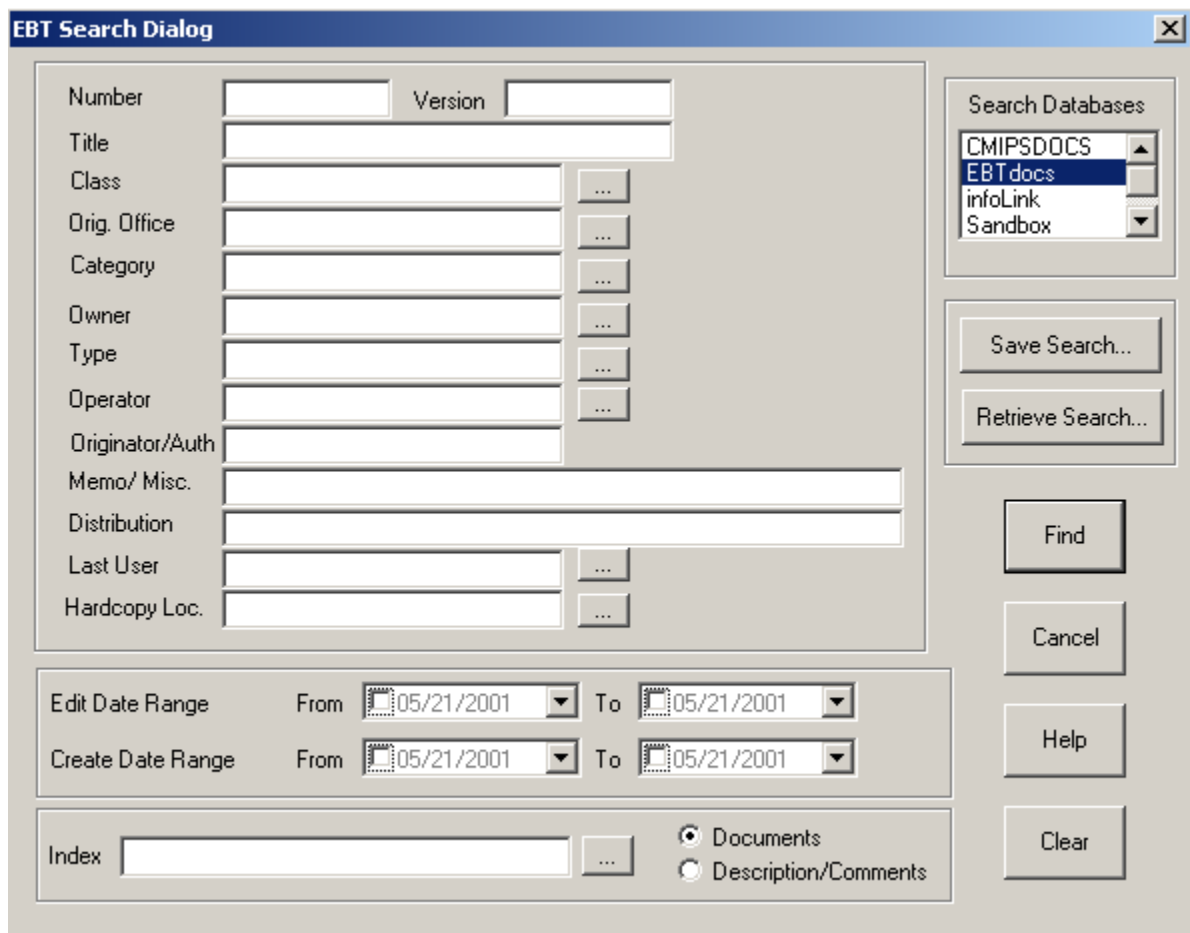


Note that your Worklist and folders are also in the tree view.

Retrieving Documents

Use your Worklist to access the last 40 documents you have worked on or perform a search to find a document. To search, highlight the database (EBTdocs) and select Search... from the iManage menu.

The normal Profile Search Dialog will appear for you to enter your search criteria and click on Find.



The EBT Search Dialog window is a standard Windows-style application window with a title bar that reads "EBT Search Dialog" and a close button (X) in the top right corner. The main area of the dialog is divided into several sections. On the left, there is a list of search criteria: Number, Title, Class, Orig. Office, Category, Owner, Type, Operator, Originator/Auth, Memo/ Misc., Distribution, Last User, and Hardcopy Loc. Each criterion has a corresponding text input field. Some fields (Class, Orig. Office, Category, Owner, Type, Operator, Last User, and Hardcopy Loc.) have a small button with three dots (a browse button) to their right. To the right of these fields is a "Search Databases" section containing a list box with four items: CMIPSDOCS, EBT docs (which is highlighted), infoLink, and Sandbox. Below the list box are two buttons: "Save Search..." and "Retrieve Search...". Further down on the right side are three more buttons: "Find", "Cancel", and "Help". At the bottom of the dialog, there is a section for date ranges. It contains two rows: "Edit Date Range" and "Create Date Range". Each row has a "From" label followed by a date picker (showing 05/21/2001) and a "To" label followed by another date picker (also showing 05/21/2001). Below the date range section is an "Index" label followed by a text input field and a browse button (three dots). To the right of the index field are two radio buttons: "Documents" (which is selected) and "Description/Comments".

EBT Search Dialog

Number: [] Version: []

Title: []

Class: [] ...

Orig. Office: [] ...

Category: [] ...

Owner: [] ...

Type: [] ...

Operator: [] ...

Originator/Auth: []

Memo/ Misc.: []

Distribution: []

Last User: [] ...

Hardcopy Loc.: [] ...

Search Databases:

- CMIPSDOCS
- EBT docs
- infoLink
- Sandbox

Save Search...

Retrieve Search...

Find

Cancel

Help

Clear

Edit Date Range: From [05/21/2001] To [05/21/2001]

Create Date Range: From [05/21/2001] To [05/21/2001]

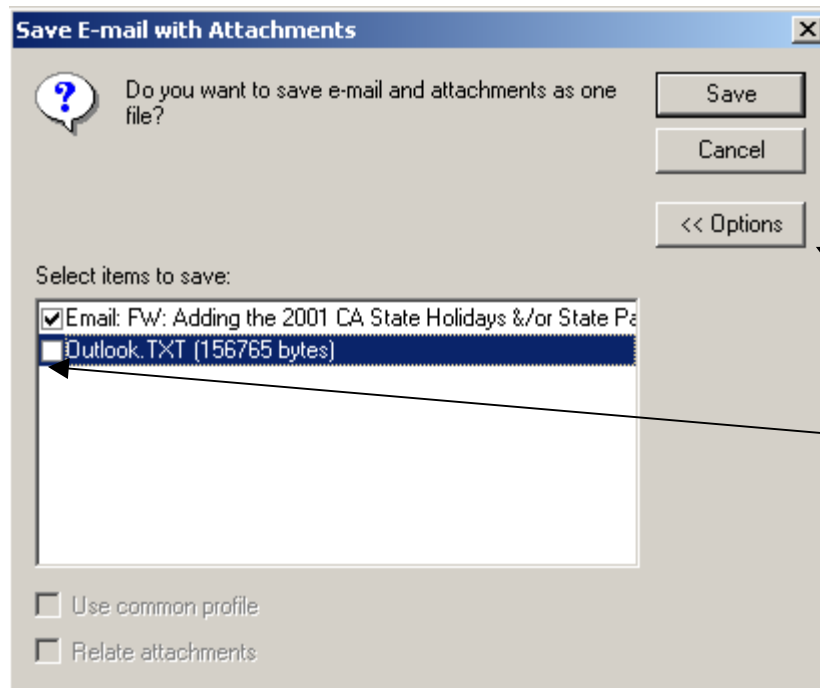
Index: [] ...

☒ Documents

☐ Description/Comments

Adding Email and Attachments into iManage

Adding email and/or email attachments into iManage is very easy. Highlight your Inbox (or other Outlook folder where the email resides), select the email message, and drag and drop it onto the iManage database (EBTdocs) or the iManage folder where you want the document to appear. The new document profile will appear, fill it in and press OK. If the email has an attachment(s) you will see this dialog box:

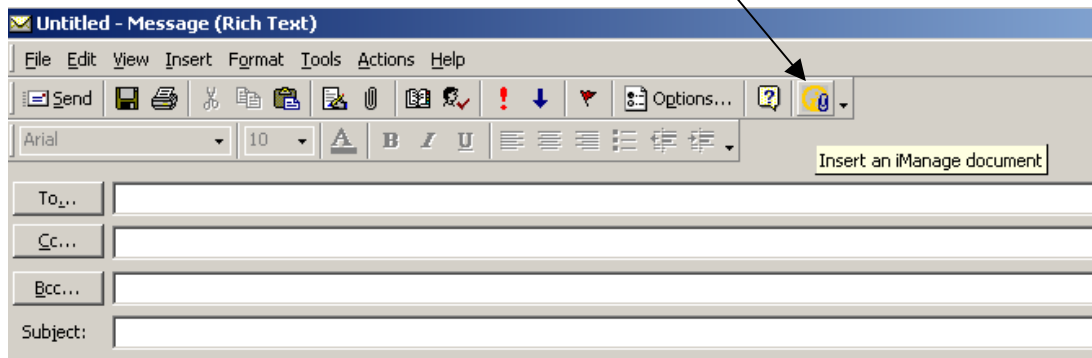


Click on Options to display the list of attachments. Check or Uncheck the items you wish to add to iManage. Click Save and a New Profile will appear.

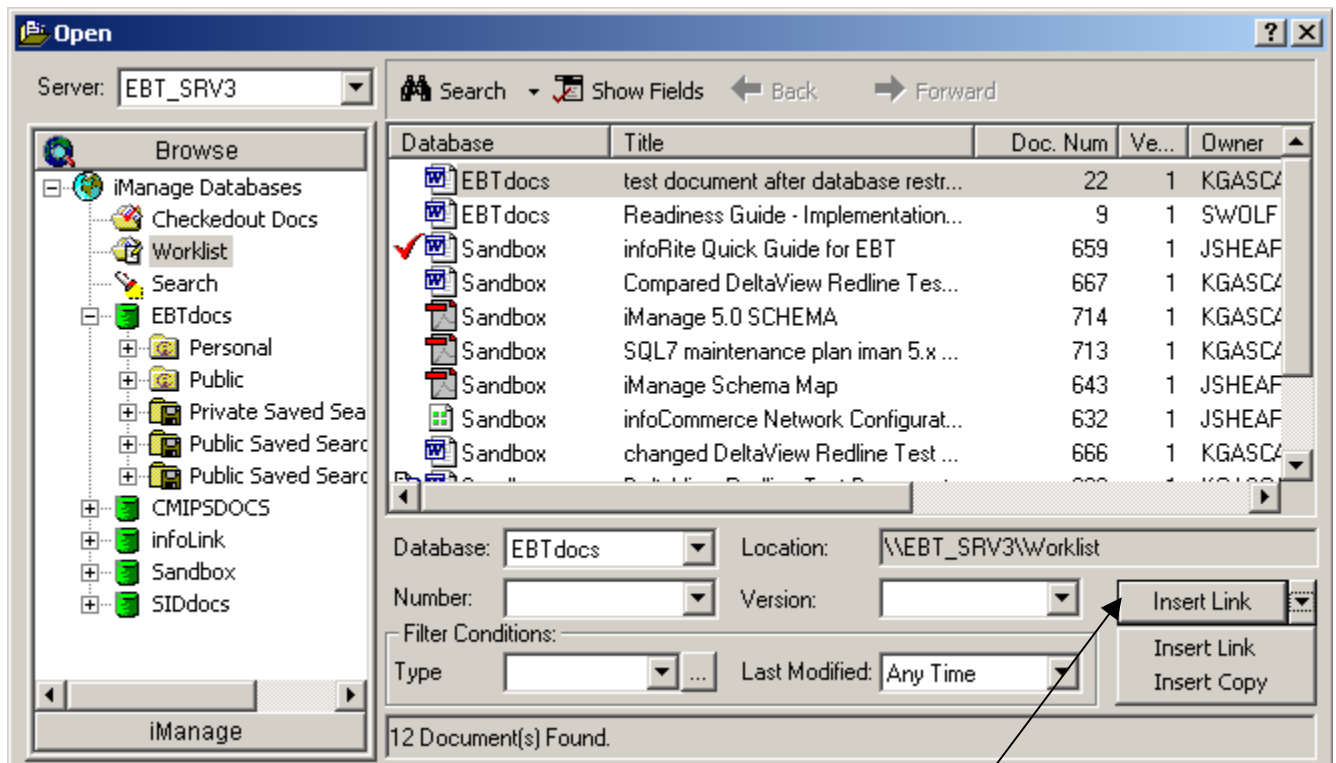
NOTE: It is important to note that the document will be **MOVED** into iManage and will no longer appear in Outlook. IF YOU WANT TO **COPY** THE ITEM INSTEAD OF MOVING IT, YOU SIMPLY HOLD DOWN THE **CONTROL KEY** ON THE KEYBOARD, THEN HIGHLIGHT THE EMAIL AND PERFORM THE DRAG AND DROP.

Attaching a Document from iManage to an Email

To attach a file that resides in iManage, start your email message, then click on the Insert iManage Document icon on the toolbar...



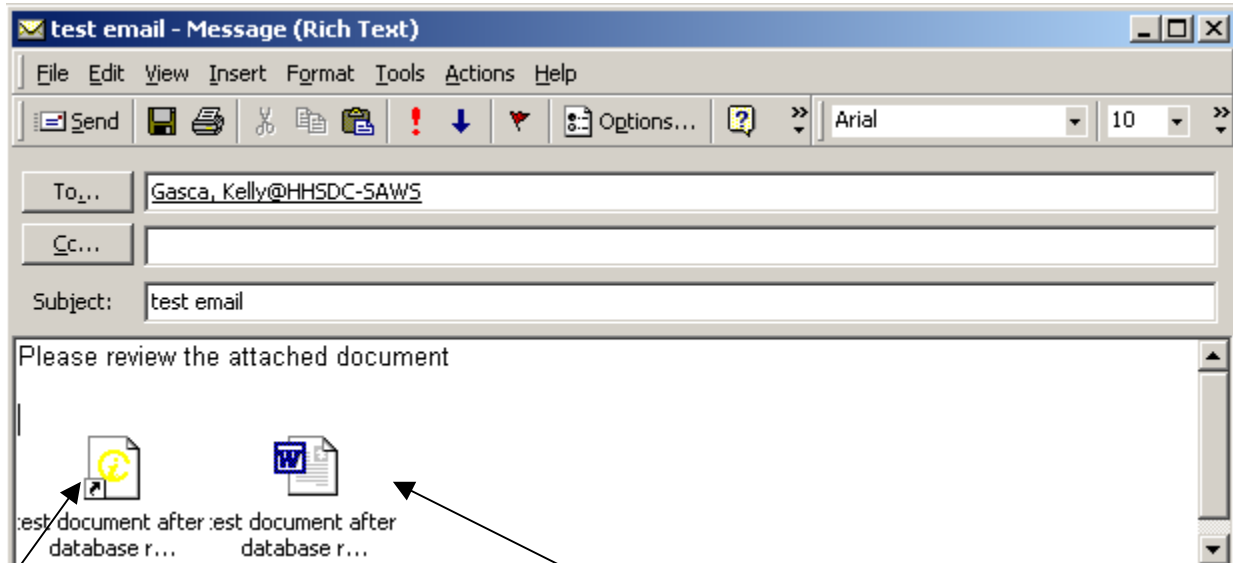
The iManage desktop will appear and you can select the document to attach from your worklist, or perform a search to find it. Once you highlight the document(s) you want to attach, click on the Insert Link or Insert Copy button. To select more than one document, hold down the control key on the keyboard while selecting the documents from the list.



IMPORTANT!! Send a LINK to DeskSite, MailSite and WorkSite Web users; send a COPY to people without iManage access

It is important to understand the difference between a document LINK and a document COPY. A copy is simply that.... a copy of the document in its full size and format—the original document is still in iManage and fully usable. A LINK is simply a “shortcut” to the document. When the recipient double-clicks it, it logs them into iManage and opens the document, thus tracking the activity in the history log. ONLY iManage USERS CAN SUCCESSFULLY OPEN A LINK.

After you click on Insert Link or Insert Copy, the attachment appears on the email and you can press Send.



This is a LINK
for iManage

This is a COPY of the
actual document for
non- iManage users

Using WorkSite Web

WorkSite Web is a web based client that provides access via Microsoft Internet Explorer. It can be used by users with access to the internet to access documents already in the database and to add new documents into the database, if allowed.

To access EBT's WorkSite Web page from the public internet, enter the following address:

<https://www.ws.ebtproject.ca.gov/worksite>

^

Note: the first time you run WorkSite Web, it will ask you to install 2 components... **answer Yes** to the questions "Trust content from iManage, Inc.?"

Login

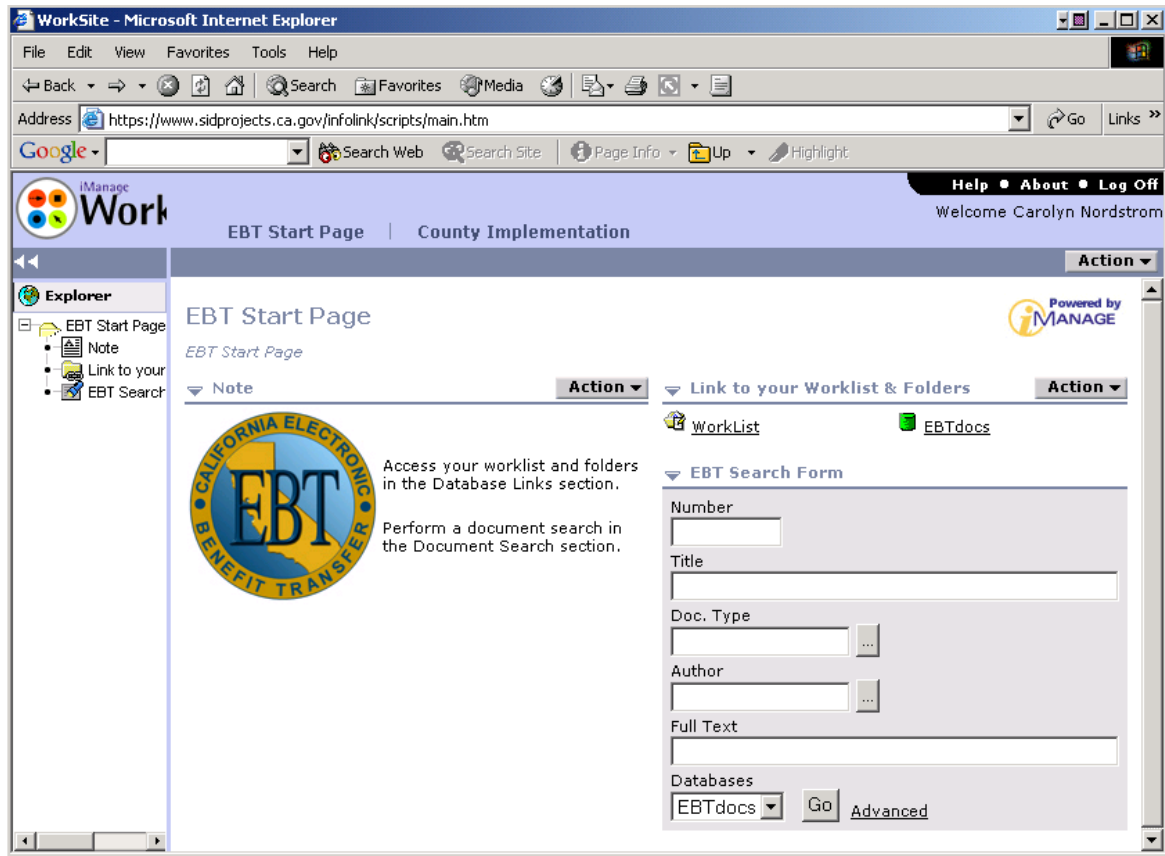
Type in your username and password. Your username is the same as your network login ID and the password is an iManage password (not necessarily the same as your network password).

The image shows the WorkSite Login interface. At the top left is the iManage logo, which consists of four colored squares (red, orange, blue, green) arranged in a circle. To the right of the logo is the text "iManage WorkSite" in a large, bold, black font. Below "iManage" is the text "Web 4.1.19" in a smaller font. In the center of the page is a rounded rectangular box with a light gray background. Inside this box, the text "WorkSite Login" is centered at the top. Below this text are two input fields: "Username" and "Password". Each field has a small vertical line on the left side. To the right of the "Password" field is a "Login" button with a blue arrow pointing to the right. Below the "Login" button is a checkbox labeled "Validate Browser" with a small blue checkmark icon to its left.

If you have trouble logging in, click on Validate Browser to verify your version of Internet Explorer Is compatible and see last page of this document outlining minimum browser requirements and required settings.

NOTE: Please Log off when you are done by clicking on the "Log Off" on the menu bar in the far upper right of the page.

EBT Start Page



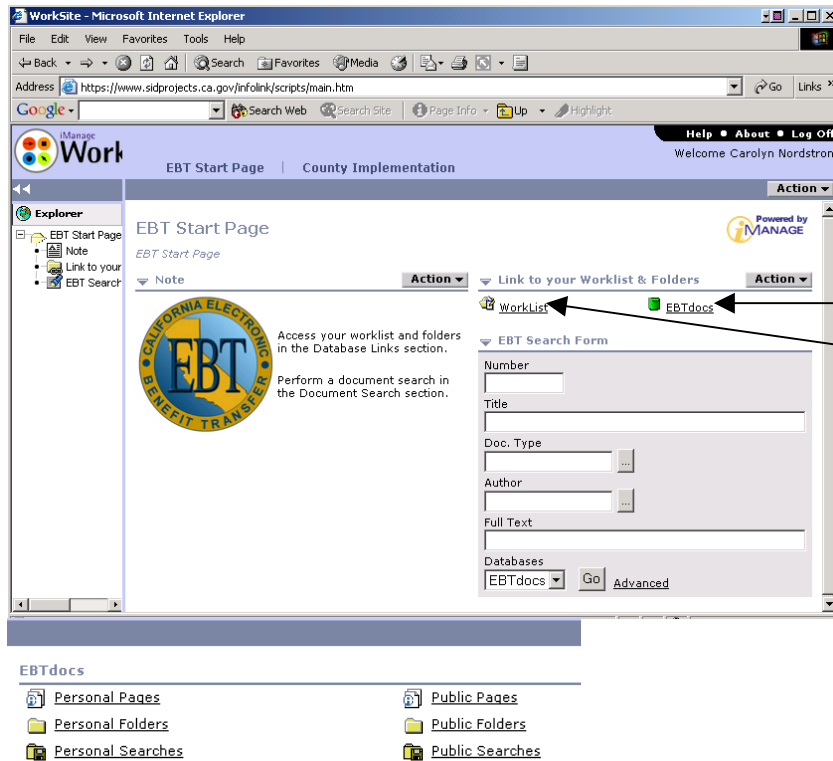
After logging in, the EBT Start Page is displayed: This is the “home page” for accessing iManage documents and other resources. The far left side (the sidebar) shows an explorer-style listing of items on the page. The main page includes a place for announcements or other text messages, links to public folders and your Worklist in iManage (if the folders contain documents, they are then listed), and a Search Form to search for documents.

There is also a County Implementation page on a tab to the right of EBT Start Page. Clicking it takes you to a page that has links to the County Implementation public folder in iManage.

NOTE: online help is available. You can access it by clicking on the word “Help” on the black menu bar in the far upper left of the window.

Worklist & Folders

You can access your worklist (the last 40 documents you have worked on) by clicking on the WorkSite icon. It will expand down to show you your Worklist, Checked Out Documents, and personal or public folders in the database.



Click on the Worklist to view your Worklist; click on EBTdocs to view folders –below is what the folder browser looks like.

Searching

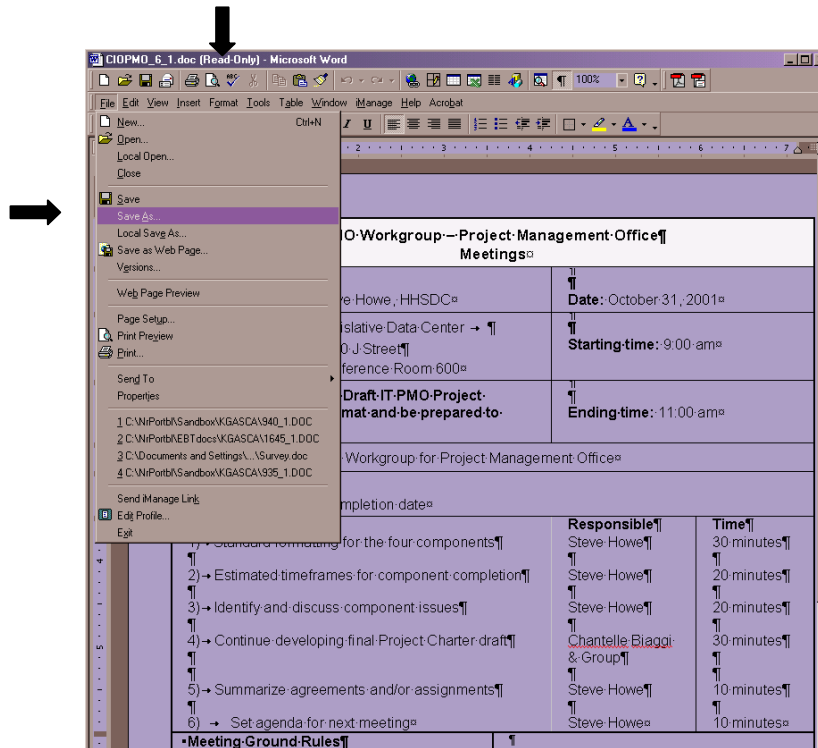
To search for a document, enter the known information and click Go. Remember, if you enter information in more than one field, the fields will be ANDed together (author=plover AND interim in the Title). Also, the Title search is a string search so is best to use **ONE WORD** searches, otherwise it will search on the *exact phrase* typed in.

EBT Search Form

Number	<input type="text"/>
Title	<input type="text"/>
Doc. Type	<input type="text"/> ...
Author	<input type="text"/> ...
Full Text	<input type="text"/>
Databases	<input type="text"/> EBTdocs <input type="button" value="Go"/> Advanced

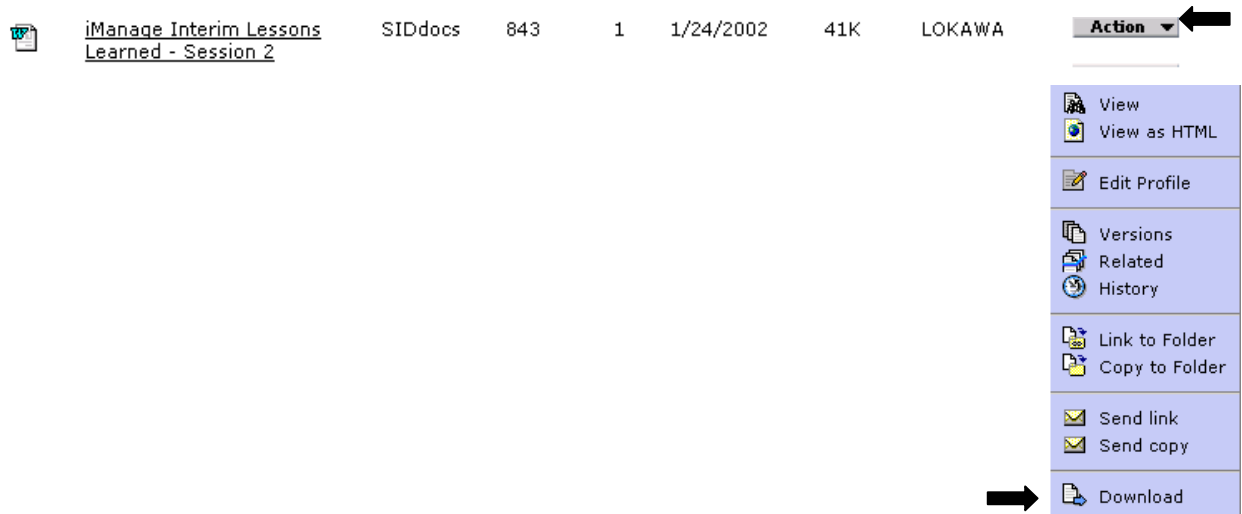
Working with Documents

After you find the document you want to work with you can view it by clicking on the underlined link (its title). This will launch Microsoft Word (or Excel) and open the document in READ ONLY mode. If you decide you would like a local copy of the file to work with or to use as a template, you can Save the document locally, by choosing File, Save As. You can also PRINT the file.

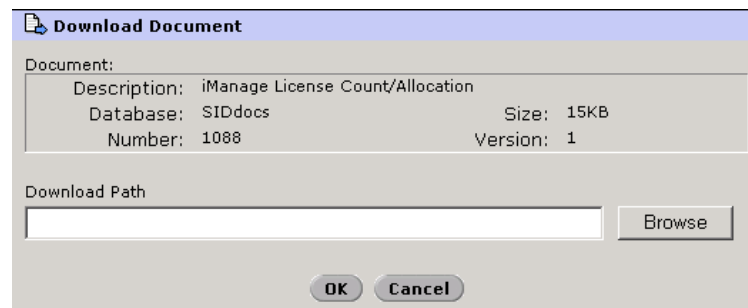


Obtaining a Local Copy

To obtain a local copy of the document without first opening it, click on the **Action** icon to the right of the document listing, and then choose Download.



The following screen will appear. Fill in the location where you would like to save the file on your local pc. You can change the file name to anything (e.g. c:\Oct 31 Agen8da.doc).



Editing a Document Already in the System

If you want to **edit** a document that is already in the system, you must first check it out so that nobody else can edit it concurrently (like a library book). After it is checked out, you can logoff the network/internet and work locally. Click on the Action icon and the Action list will appear:

The screenshot shows a table titled "Newcomer's Guide" with columns: Num, Ver, Title, Edit Date, Size, Author, and Action. The table contains four rows of document information. An arrow points to the "Action" dropdown menu for the last row. A second arrow points to the "Checkout" option in the expanded menu.

Num	Ver	Title	Edit Date	Size	Author	Action
196	1	iManage infoRite Quick Guide for EBT--duplex print version	2/27/2002	1111K	KGASCA	Action
353	1	iManage Searching Handout for Web Distribution last modified 6/7/01	2/26/2002	187K	KGASCA	Action
207	1	MAP: Directions to Natomas Park Project Office	2/21/2002	61K	KHEWITT	Action
1504	1	Remote Access Guide for Dialup or VPN -- setup for duplex printing	12/19/2001	872K	KGASCA	Action

4 Items

- View
- View as HTML
- Edit Profile
- Checkout
- New Version
- Versions
- Related
- History
- Link to Folder
- Copy to Folder
- Move to Folder
- Send link
- Send copy
- Download
- Delete
- Purge

Choose Checkout from the Actions list and the following checkout screen will appear. Specify the location to check it out to by browsing to it (e.g. c:\My Documents or a:\) – iManage will fill in a file name which is based on a document number. It is best to leave it (not change it) and click on OK.

There is a check box “Open Document” – if this box is checked when you click OK, the document will be checked out to your local drive and immediately opened in the applications (Word/Excel) for editing. It is a convenience feature.

NOTE: you will not have the checkout option if you only have Read-Only access to the document. Only users with Read/Write access may check a document out for editing.

The screenshot shows the "Checkout Document" dialog box. It contains fields for Document Description, Database, Number, Size, and Version. The Checkout Path field is populated with "C:\CIOPMO_88_1.doc". The Checkout Options section includes a Due Date field set to "2/26/2002" and a checked "Open document" checkbox. There is a Comments text area and OK/Cancel buttons at the bottom. Arrows point to the "Browse" button, the "Open document" checkbox, and the "OK" button.

Document

Description: PM Pillars Scope Definition
Database: CIOPMO
Number: 88
Size: 32KB
Version: 1

Checkout Path
C:\CIOPMO_88_1.doc

Checkout Options
Due Date: 2/26/2002
☒ Open document
Comments:

OK Cancel

After you are done making changes to the document on your local pc, you need to login back in to WorkSite and check it back in so that the changes are available to everyone. After logging in, go back to the document folder where it resides (or click on your Checked Out Documents or Search for it), and activate the Actions menu, and choose Checkin. Note: the red check indicates the document is checked out.

	Num	Ver	Title	Edit Date	Size	Author	Action
	353	1	iManage Searching Handout for Web Distribution last modified 6/7/01	2/26/2002	187K	KGASCA	Action
	207	1	MAP: Directions to Natomas Park Project Office	2/21/2002	61K	KHEWITT	Action
	196	1	iManage infoRite Quick Guide for EBT--duplex print version	1/29/2002	1111K	KGASCA	Action
	1504	1	Remote Access Guide for Dialup or VPN -- setup for duplex printing	12/19/2001	872K	KGASCA	Action

4 Items

- View
- View as HTML
- Edit Profile
- Checkin**
- Versions
- Related
- History
- Link to Folder
- Copy to Folder
- Move to Folder
- Send link
- Send copy
- Download
- Delete

The following checkin screen will appear. As long as you did not give the file a new name, or move it to a new location, you do not need to Browse for the file name/location. If you want to delete the local copy after it is copied to the server, check the box Delete Local Copy.

Checkin Document

Document

Description: PM Pillars Scope Definition
Database: CIOPMO
Number: 88
Version: 1

File
C:\CIOPMO_88_1.doc Browse

☐ Delete Local Copy

Options

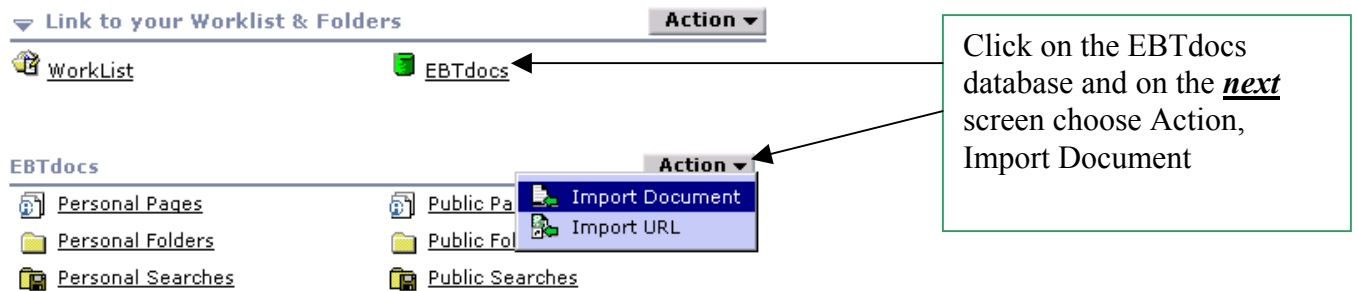
☒ Replace original ☐ New version
☐ Undo checkout ☐ New document

OK Cancel


To **replace** (overwrite) the copy on the server with the copy you just edited, choose Replace original. If you want to leave the copy on the server alone and import your document as a **new version** of the original, choose New version -- if you choose this option, you will be prompted to modify the document profile (see next section "Importing a New Document"). If you just want to check it back in and disregard your checked out copy, choose **Undo checkout**. If you want to save your changes into a completely new document choose **New document**. -- if you choose this option, you will have to fill out a new profile (see next section "Importing a New Document").

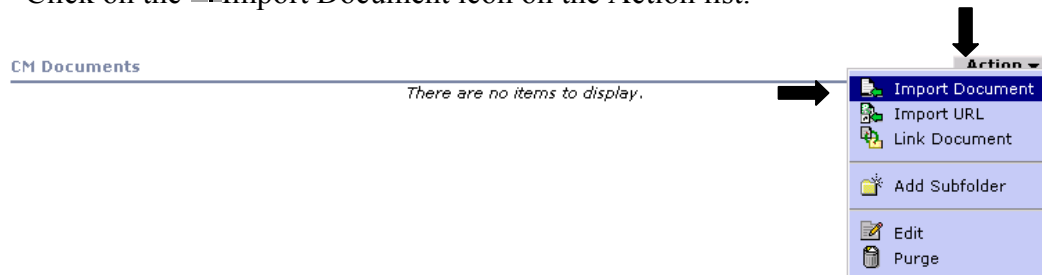
Importing a New Document

To import a new document into iManage, go to the EBTdocs database on the Start Page:

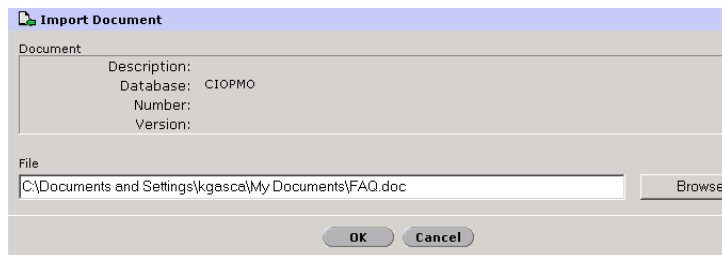


You can also import a document directly into a folder.

1. go to the folder you would like to add a document to (e.g. County Implementation/Alameda)
2. Click on the  Import Document icon on the Action list.



The following dialog box will appear asking you which document from your local system you want to import into the web page.



Browse or type in the path and filename and click OK. A profile screen will appear – this is where you give the document its title, put yourself as the author (e.g. kmurdock), and the file type (WORD97, EXCEL97 – **note use these for Word/Excel 97 and Word/Excel2000**). Once you click Save, the document will be uploaded to the website and a link will appear in the folder. You can click on the ... button to select from a list of valid users, document classes and types.

The screenshot shows the 'New Document Profile' window with the 'Profile' tab selected. The window has a title bar 'New Document Profile' and buttons 'Save' and 'Cancel'. The 'Profile' tab contains the following fields:

- Title: Type in the document title here
- Originating Entity: [text box] ...
- Sub Area: [text box] ...
- Owner: [text box] ...
- Doc. Type: [text box] ...
- File Type: [text box] WORD97
- Description: [text box]
- Operator: [text box] CNORDSTR

A note on security: If you just fill in the profile and click on Save, the document will be imported as **Private** – this means only the person listed in the Owner and Operator fields will be able to see and use the document. Click on the Security tab to change default security to public or to set specific security access by clicking on Add Users/Groups.


The screenshot shows the 'New Document Profile' window with the 'Security' tab selected. The window has a title bar 'New Document Profile' and buttons 'Save' and 'Cancel'. The 'Security' tab contains a table with the following columns:

Group ID/User ID	Full Name	Access Right

At the bottom of the window, there are buttons 'Add Users', 'Add Groups', and 'Remove User/Group'. To the right of these buttons is a 'Default Security' dropdown menu currently set to 'Private', and an 'Access' dropdown menu. The 'Default Security' dropdown menu is open, showing the following options:

- Private
- Public
- View

Internet Explorer Browser Requirements & Settings

 On Microsoft Windows:
Internet Explorer 5.01 SP2
Internet Explorer 5.5 SP2
Internet Explorer 6.0*

Note: Internet Explorer 4.x and Netscape are not supported in this release.

*We recommend that Internet Explorer 6.0 users install the latest version of Microsoft's Java Virtual Machine, which is available for download freely from Microsoft's web site at:

http://www.microsoft.com/java/vm/dl_vm40.htm

Note: To use iManage WorkSite from a browser on a Windows XP machine, you must have the Microsoft Java Virtual Machine installed. This is available for download from Microsoft's web site and must be installed separately. Please see Microsoft's [Open Letter Regarding Windows XP and Java Support](#) for further information. Even with this configuration, you may have trouble connecting on an XP platform.

Internet Explorer Security Settings

In the Internet Explorer menu, click on Tools | Internet Options and select the "Security" tab.

If WorkSite is being used over the internet, then the "Medium" security zone should be applied to it. If WorkSite is being used over an intranet, then the "Medium-low" security zone should be applied.

If a firewall is employed at the ISP level, confirm that the ISP allows the download of ActiveX/Applets.

If security is being customized via the "Custom Level..." button, the following options should be enabled:

- 1) Download signed ActiveX controls (Enable/Prompt)
- 2) Run ActiveX controls and plug-ins (Enable)
- 3) Script ActiveX controls marked safe for scripting (Enable)
- 4) Allow cookies that are stored on your computer (Enable)
- 5) Allow per-session cookies (Enable)
- 6) File download (Enable)
- 7) Java permissions (High safety)
- 8) Active scripting (Enable)
- 9) Scripting of java applets (Enable)

****Note:** iManage does not recommend customizing security when running WorkSite (infolink).

After you have set security to the levels you desire, you can go to the default login page of your WorkSite web site to test browser compatibility.